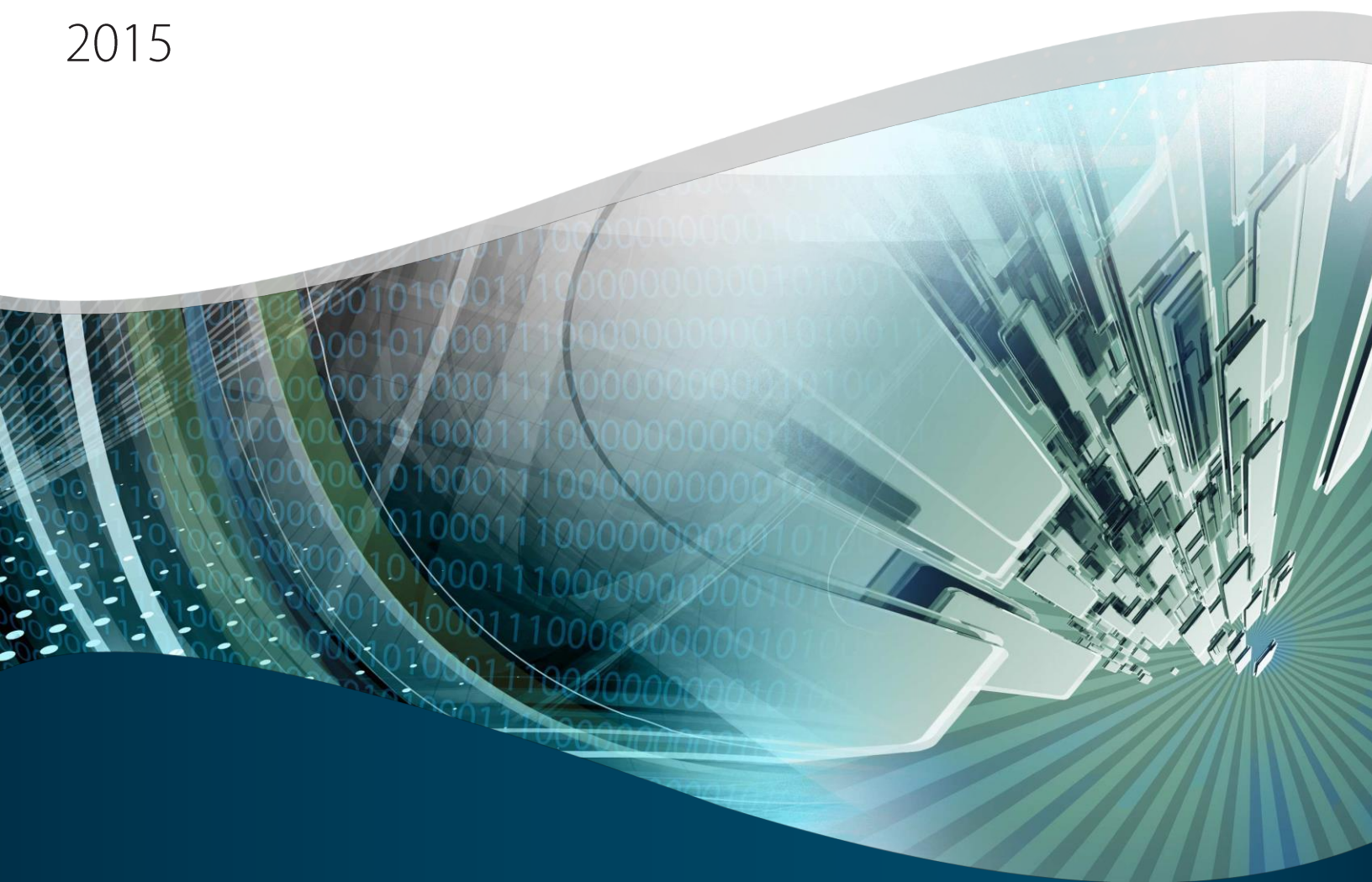


Industry Report

The Streaming Media Device Landscape

2015



Attribution

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Published by Parks Associates

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Quality Assurance

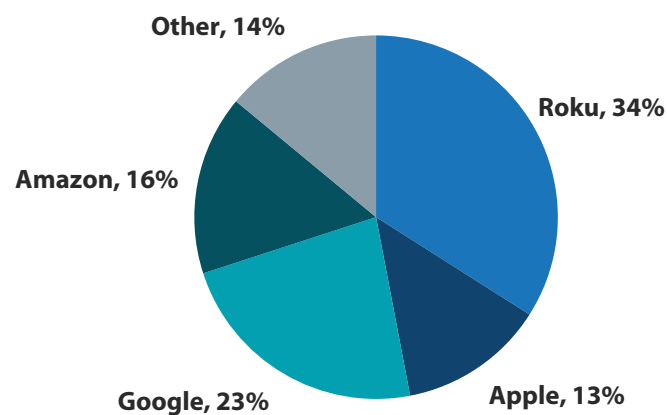
Analyst	bk	7/28/15
Exec Editor	TP	7/27/15

Annual sales of traditional gaming consoles to U.S. broadband households have been essentially flat since 2012 despite the launch of new-generation consoles in 4Q 2013. Annual U.S. sales for both Blu-ray players and DVRs continue to decline.

3.1.1 Streaming Media Device Unit Sales

In the U.S., streaming media device sales are dominated by four companies—Roku, Google, Amazon, and Apple—in 2014 (**Figure 9**).

2014 U.S. Streaming Media Device Sales by Brand (Q1/15) Among Purchasers of Streaming Media Devices, n = 1,272, ±2.75%

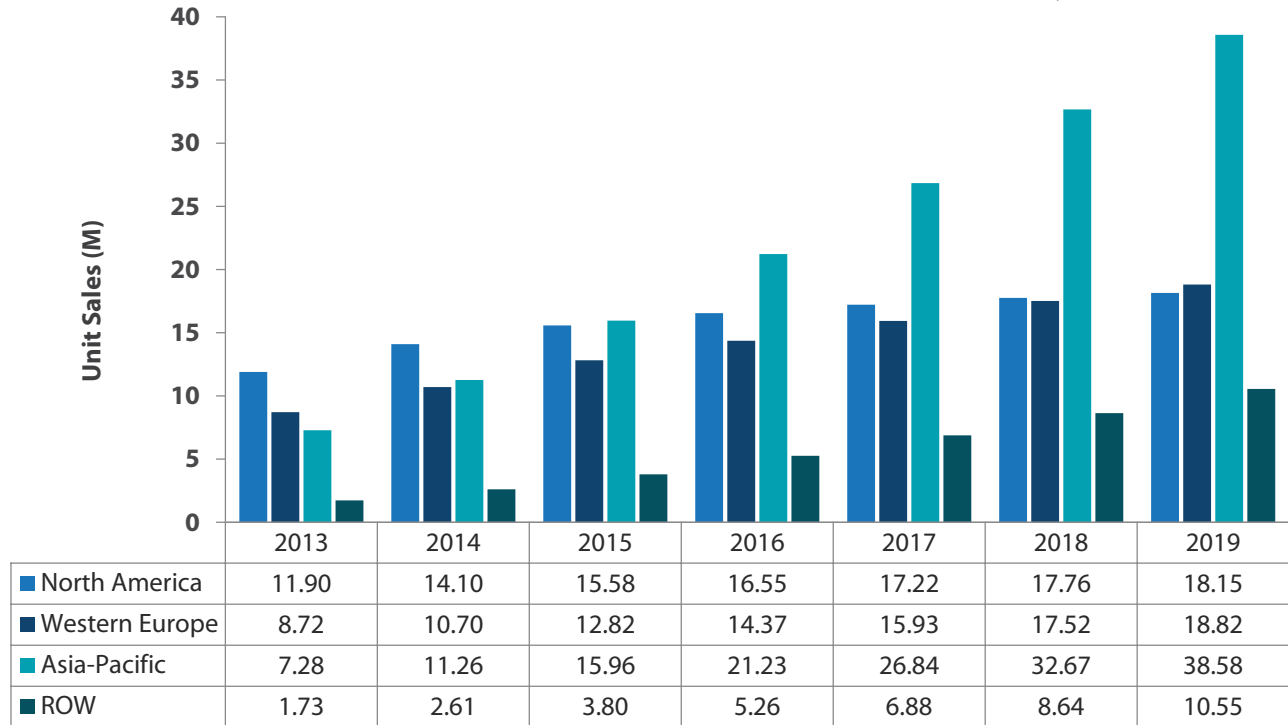


"Q2050. What brand did you purchase?" | Source: American Broadband Households and Their Technologies Q1 2015 | N=10,000, ±0.98% | © 2015 Parks Associates

Figure 9 2014 U.S. Streaming Media Device Sales by Brand

For the last five years, a handful of brands have accounted for a large percentage of annual sales (**Figure 10**). In 2010, the major players were Roku and Apple, accounting for a combined 48% of unit sales in the U.S. That leadership continued, with the two companies accounting for 68% of unit sales in 2012. The landscape began changing in 2013 with the introduction of the Google Chromecast. The dongle sold as many units in 2013 as Roku did due to a combination of the new form factor, low price, and tech-savvy strength of the brand. In 2013, Roku, Google, and Apple accounted for 82% of unit sales. Google Chromecast's share of unit sales declined in 2014, but the Chromecast still came in number two with 23% of streaming media device sales to U.S. broadband households. The Amazon Fire TV was introduced in 2014 as were stick form factors from Roku and Amazon; these top four brands now account for 86% of streaming media device unit sales in the U.S.

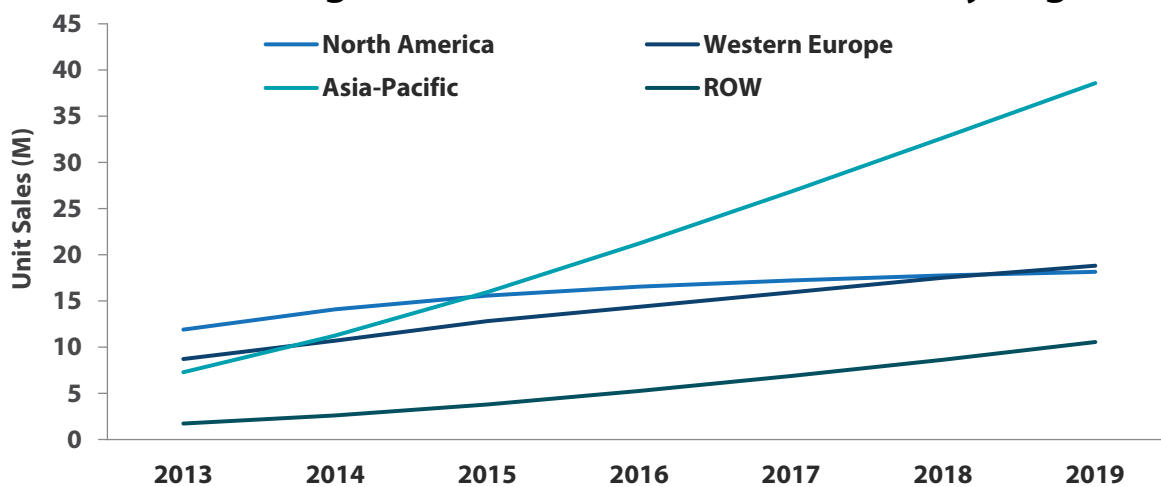
Total Streaming Media Device Unit Sales Forecast by Region



Parks Associates Forecast | © 2015 Parks Associates

Figure 29 Total Streaming Media Device Unit Sales Forecast by Region

Total Streaming Media Device Unit Sales Trend by Region



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Figure 30 Total Streaming Media Device Unit Sales Trend by Region